

# Total Workforce Management Services (TWMS) Quick User Guide

## *Managing Training Requirements*



*Periodic updates to the Training Requirements module may not be reflected in this document.*

# Training Requirements in TWMS

TWMS provides the functionality to assign and manage the required training for your personnel. Access to the Training Requirements Module is restricted to those whose request for the module have been approved.

The scope of your TWMS access will determine who you can assign training requirements for. For example, you will only be able to assign training requirements for personnel belonging to UIC(s) that you have access to.

TWMS also allows you to create new training requirements specific to your needs. For example, you will be able to create and assign a training requirement for civilian personnel having a specific occupational series.

As employees move into or out of your scope of access, TWMS can help you to automatically add or delete the training requirement for those employees. So, if a new civilian employee falls under the occupational series that has been designated for a particular training requirement then that employee will also have that requirement.

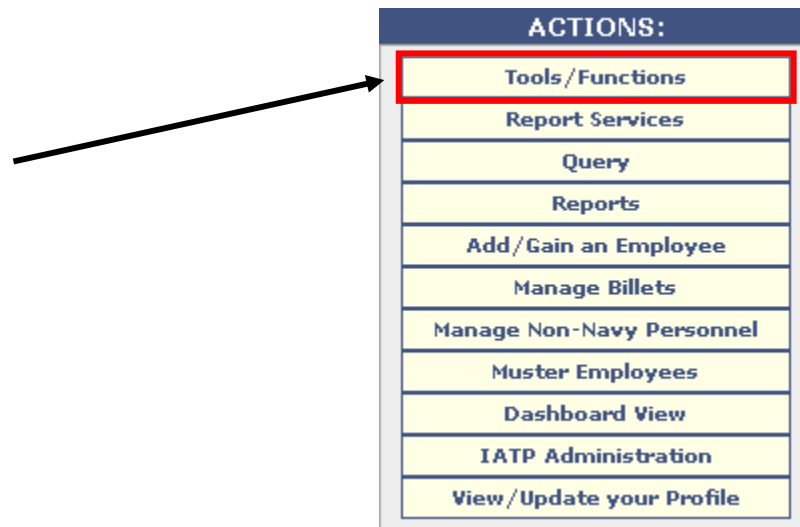
Security features will let you decide the scope of who will be able to see and assign to others the requirements you have created. Conversely, you will also be able to assign training requirements from an existing requirement that you can see which was created by someone else. Finally, TWMS allows you to generate an email notification about new training requirements and email reminders

# Creating a Training Requirement

TWMS allows you to create a training requirement that can be assigned to employees within your scope of access. You can allow this requirement to be seen by other users so that they may also assign employees to the requirement within their scope of access.

To create a training requirement:

1. From the Home Page click on the **Tools/Function** button on the Actions Menu.



2. From the Tools & Functions form choose the **Manage Training Requirements** button.



# Creating a Training Requirement

A new window opens displaying the Training Requirements form. This form contains two tabs. One tab is labeled “Search Requirement” and is the default view. It lists the training requirements (not the training courses) you are able to see that have already been created (either by you or by someone else who has allowed you viewing rights). The other tab is labeled “Create New Requirement” and is used to create a new training requirement.

3. Click the **Create New Requirement** link.

**Training Requirements**

**Search Requirements** **Create New Requirement**

Requirement:  Fiscal Year:  Status:

<< Previous Page 1 of 2 Next >> Sort by:

(22) records found.

ID	Requirement/Description	FY	Start Date	End Date	Created	Created By
11	(CLC 012) COR OVERVIEW (HCAA) - FOR LEADERSHIP	2009	1-Jan-2009	30-Apr-2009	20-Apr-2009	
160	2010 DOD INFORMATION ASSURANCE AWARENESS (CNIC) FY2010 IA Awareness Training Requirement for all CNIC personnel IT users		1-Oct-2009	31-Mar-2010	5-Nov-2009	SCOT,MACDONALD
75	ANNUAL DOD PRIVACY (PII) TRAINING Annual DOD Personally Identifiable Information (DOD PII) Privacy Act training in accordance with DON CIO Message: R 1819052 DEC 08		1-Jan-2009	31-Dec-2009	23-Jul-2009	SCOT,MACDONALD
68	Annual Security Brief Required once annually by all personnel who have access to classified information as outlined in SECNAV M-5510.30 June 2006.		1-Dec-2008	30-Nov-2009	14-Jul-2009	
30	ATFP LEVEL I AWARENESS TRAINING FOR SERVICE MEMBERS (CONUS)		1-Nov-2007	31-Oct-2009	20-Apr-2009	

This form has two tabs.

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# Creating a Training Requirement

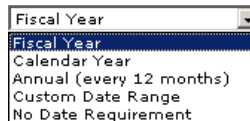
A brief description of some of the items displayed on the “Create New Requirements” form is shown below.

**Requirement Name** – Enter the name of the requirement here. The requirement name is not necessarily the same as a title of a course that can satisfy this requirement.

**Description** – Useful information about the requirement can be entered here.

**Completion Date Type** – Several choices are available that determine when the requirement needs to be completed. For example, choosing “Fiscal Year” requires the year the requirement needs to be completed in. Other choices require different data to be entered.

**Which other training personnel can see this requirement?** – Choose who else, if anyone, will be able to see this requirement. The ability to see a training requirement also enables that



A dropdown menu with the following options: Fiscal Year, Fiscal Year, Calendar Year, Annual (every 12 months), Custom Date Range, and No Date Requirement. The first two 'Fiscal Year' entries are highlighted.

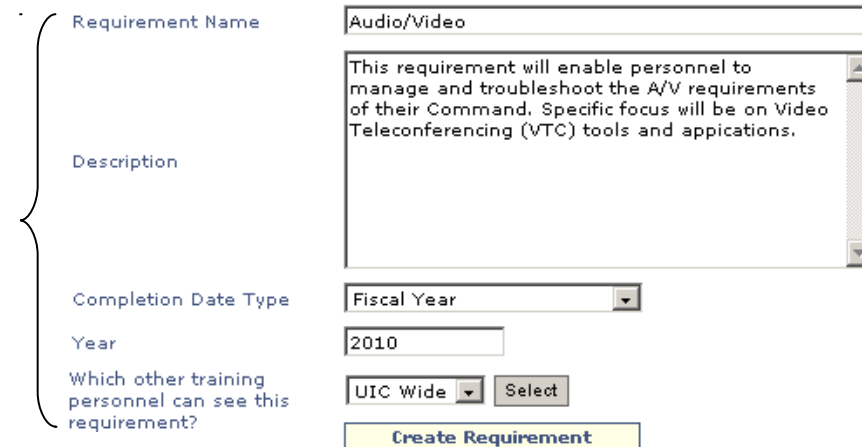


A dropdown menu with the following options: Me Only, Me Only, UIC Wide, and BSO Wide. The 'UIC Wide' entry is highlighted.

## Create New Requirement

[Search Requirements](#)

[Create New Requirement](#)



A screenshot of the 'Create New Requirement' form. The form includes the following fields and controls:

- Requirement Name:** A text input field containing 'Audio/Video'.
- Description:** A large text area containing the text: 'This requirement will enable personnel to manage and troubleshoot the A/V requirements of their Command. Specific focus will be on Video Teleconferencing (VTC) tools and applications.'
- Completion Date Type:** A dropdown menu with 'Fiscal Year' selected.
- Year:** A text input field containing '2010'.
- Which other training personnel can see this requirement?:** A dropdown menu with 'UIC Wide' selected, and a 'Select' button next to it.
- Create Requirement:** A yellow button at the bottom of the form.

# Creating a Training Requirement

If you allow this new training requirement to be seen by other UIC(s) or BSO(s) then you must select them. Only those employees who are a member of and have access to the UIC(s)/BSO(s) you have selected will be able to view the requirement and also assign the requirement to others.

4. Click the **Select** button to choose the UIC(s) that will also be able to view this requirement.

## Create New Requirement

[Search Requirements](#) [Create New Requirement](#)

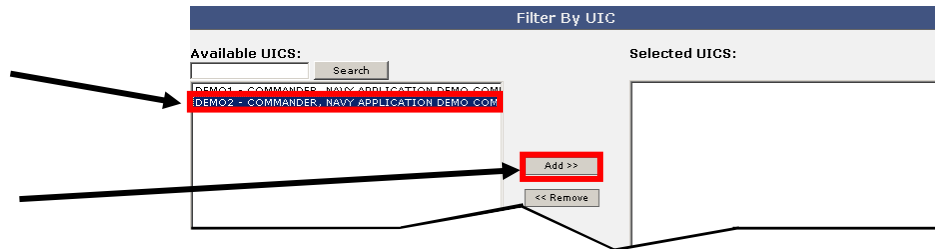
The screenshot shows the 'Create New Requirement' form. It includes fields for 'Requirement Name' (containing 'Audio/Video Maintenance'), 'Description' (a large text area), 'Completion Date Type' (a dropdown menu set to 'Fiscal Year'), and 'Year' (a text box containing '2010'). Below these is a section titled 'Which other training personnel can see this requirement?' containing a dropdown menu set to 'UIC Wide' and a red-bordered 'Select' button. A 'Create Requirement' button is at the bottom right. A black arrow points from the instruction text on the left to the 'Select' button.

# Creating a Training Requirement

All available UIC(s) within your scope of access will be displayed.

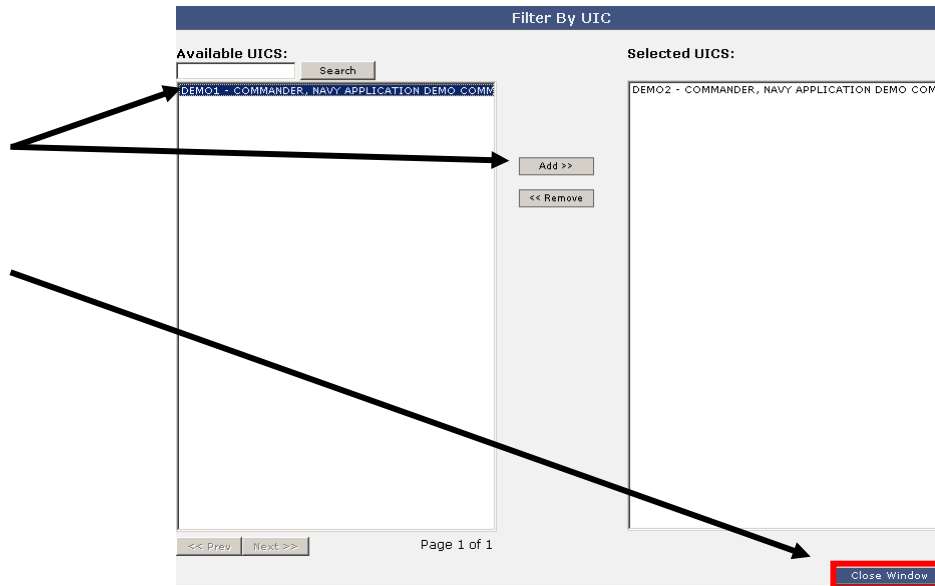
5. Search for the UIC you would like to add.

6. Click **Add** to move it to the list of selected UIC(s).



7. Repeat steps 5-6 to add other UIC(s).

8. Click the **Close Window** button.



# Creating a Training Requirement

Only the creator of a training requirement can enter and change the information displayed here that is related to the requirement.

## Create New Requirement

[Search Requirements](#)

[Create New Requirement](#)

Requirement Name

Audio/Video

Description

This requirement will enable personnel to manage and troubleshoot the A/V requirements of their Command. Specific focus will be on Video Teleconferencing (VTC) tools and applications.

Completion Date Type

Fiscal Year

Year

2010

Which other training personnel can see this requirement?

UIC Wide

Select

Create Requirement

9. Click the **Create Requirement** button.



# Creating a Training Requirement

After creating the new training requirement the Edit Requirement form is displayed. This form contains five additional tabs which will be used to view courses, assign people, and apply automation rules to this training requirement. The default view is the “Requirement Details” tab.

This form contains five additional tabs.

10. Click **Manage Course Titles** to view the courses that will satisfy this requirement.

*Note: Since this is a requirement you created you are able to change any of the information shown in this tab. Click **Update Requirement** if you make any changes here.*

The requirement name is displayed here.

**Edit Requirement - Audio/Video Maintenance**

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | Manage Course Titles | Find/Add Members | Manage Current Members | Automation Rules

Requirement # 74

Requirement Name Audio/Video Maintenance

Description

Completion Date Type Fiscal Year

Year 2010

Which other training personnel can see this requirement? UIC Wide Select

Status Active

Automation Rules Settings -

☐ Enable auto create ?

☐ Enable auto remove ?

Created By: MANAGER, DEMO  
MANAGER, DEMO

**Update Requirement** Copy Requirement Delete Requirement

# Creating a Training Requirement

The Manage Course Titles form now displays. Use this form to find the courses that will satisfy this training requirement.

11. Enter either the Course ID# or Course Title (or a part of it) and then click **Find**. Courses matching your criteria will display.

**Manage Course Titles - Audio/Video Maintenance**

[Search Requirements](#) | [Create New Requirement](#) | [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

**Find a Course**

Course ID#

Course Title (separate multiple terms with a semicolon)

**Find**

**Selected titles that satisfy the requirement**

☐ All [<< Remove Checked Courses](#)

No records found

*Note: The Course ID# is a number generated by TWMS and is not related to any other ID# attached to the course title displayed outside of TWMS.*

12. Click the **Add** button next to a course name to add it to the list of courses that will satisfy this requirement.

**Manage Course Titles - Audio/Video Maintenance**

[Search Requirements](#) | [Create New Requirement](#) | [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

**Find a Course**

Course ID#

Course Title (separate multiple terms with a semicolon)

**Find**

3 records found

<b>Add</b>	<b>2009 NAVY PA/VI TRAINING SYMPOSIUM</b> Course ID: DCPDS-88069 Delivery Method: APF Hosted on TWMS: No
<b>Add</b>	<b>A/V MANAGEMENT</b> Course ID: S-400-2031 Delivery Method: FCT Hosted on TWMS: No
<b>Add</b>	<b>PA/VI TRAINING SYMPOSIUM</b> Course ID: DCPDS-88667 Delivery Method: APF Hosted on TWMS: No

**Selected titles that satisfy the requirement**

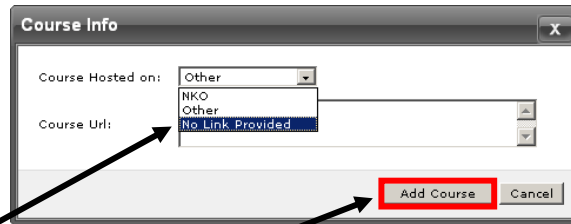
☐ All [<< Remove Checked Courses](#)

No records found

# Creating a Training Requirement

If TWMS does not host the selected course then you can select if it is hosted on NKO or an “other” location and also provide a web link, if known. For each member who views this requirement, the link will then be displayed for them to begin the course.

13. If you know where the course is hosted then choose that option and also provide the course URL. If you don't know where the course is hosted then choose **No Link Provided**.



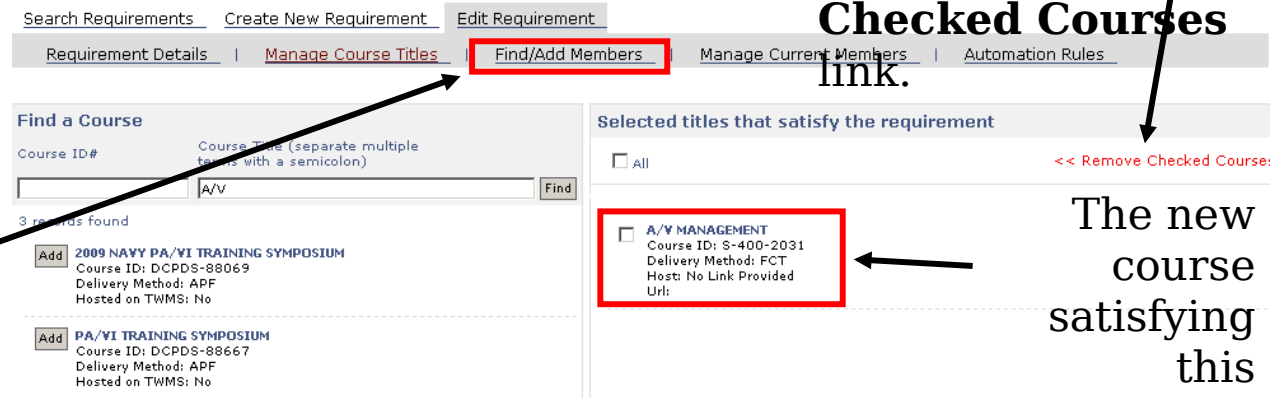
The 'Course Info' dialog box has a 'Course Hosted on:' dropdown menu with options: 'Other', 'NKO', 'Other', and 'No Link Provided'. The 'No Link Provided' option is selected. Below the dropdown is a 'Course Url:' text field. At the bottom right are 'Add Course' and 'Cancel' buttons. Arrows point from the text in step 13 to the dropdown and the 'Add Course' button.

If a course needs to be removed then check the box next to its title and then click the

**<<Remove Checked Courses** link.

14. Click **Add Course**.

## Manage Course Titles - Audio/Video Maintenance



The interface shows tabs for 'Search Requirements', 'Create New Requirement', and 'Edit Requirement'. Below these are 'Requirement Details', 'Manage Course Titles', and 'Find/Add Members' (highlighted with a red box). The 'Find a Course' section has a 'Course ID#' field and a 'Course Title (separate multiple titles with a semicolon)' field with 'A/V' entered. A 'Find' button is next to it. Below this, it says '3 records found' and lists two courses: '2009 NAVY PA/YI TRAINING SYMPOSIUM' and 'PA/YI TRAINING SYMPOSIUM'. To the right, under 'Selected titles that satisfy the requirement', there is a checkbox and the course 'A/V MANAGEMENT' with details: 'Course ID: S-400-2031', 'Delivery Method: FCT', 'Host: No Link Provided', and 'Url:'. An arrow points from the text in step 15 to the 'Find/Add Members' button. Another arrow points from the text in step 14 to the 'Add Course' button in the 'Course Info' dialog box. A third arrow points from the text in step 15 to the 'Find' button. A fourth arrow points from the text in step 15 to the 'A/V MANAGEMENT' course entry in the 'Selected titles' list.

15. Click **Find/Add Members** to assign employees to this requirement.

The new course satisfying this requirement is now listed

# Creating a Training Requirement

In the Find/Add Members form you can search for employees within your scope of access that you would like to assign to this training requirement. Results of your search will display only those employees that are not currently assigned.

*Note: You can search for employees to assign to this requirement by entering any combination of their first name, last name, UIC, Org, Employee Type, etc. You can also sort the results of your search in different ways.*

16. Enter Org code and then click the drop down arrow under the "Emp Type" field and then click **Filter By Type**.

17. Click the **Select** button.

## Find/Add Members - Audio/Video Maintenance

Search Requirements Create New Requirement Edit Requirement

Requirement Details | Manage Course Titles | Find/Add Members | Manage Current Members | Automation Rules

1. Find members (results only show members in your scope who have no record for this requirement)

First Name Last Name UIC Org Emp Type Sup Lvl

Official --View All-- Select N6 --View All-- Select --ALL--

Series Desig Rate Bus BSO SMC Sort By Last Name Search

2. Set requirement options and add members

Required: Yes Reason not required: n/a Send email Note to Member(s) Reply email: MANAGER.DEMO@NAV

<< Previous Page 0 of 0 Next >>

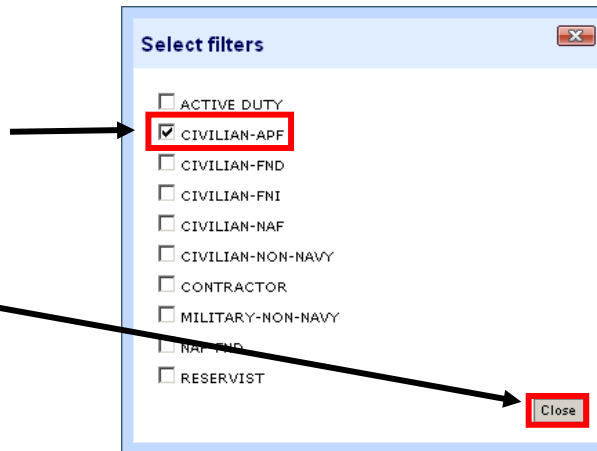
Add all members in search results >>

Name	UIC	Assigned UIC	Org Code	Assigned Org	Type
------	-----	--------------	----------	--------------	------

# Creating a Training Requirement

All available Employee Types will be displayed in a new window.

18. Select the employee type(s) you would like to include in your employee search by clicking the associated checkbox.



19. Click **Close**.

20. Click the **Search** button.

## Find/Add Members - Audio/Video Maintenance

[Search Requirements](#) [Create New Requirement](#) [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

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**1. Find members** (results only show members in your scope who have no record for this requirement)

First Name:  Last Name:  UIC:  Org:  Emp Type:  Sup Lvl:

Series:  Desig:  Rate:  Bus:  BSO:  SMC:  Sort By:

Filter by Type:  Select:  --View All--:  Select:  --ALL--:

**Search**

---

**2. Set requirement options and add members**

Required:  Reason not required:  Send Email Note to Member(s): ☐ Reply email:

<< Previous Page 0 of 0 Next >>

Add all members in search results >>

Name	UIC	Assigned UIC	Org Code	Assigned Org	Type
------	-----	--------------	----------	--------------	------

# Creating a Training Requirement

You can now set any requirement options for each member of your search results. For example, the option to send a notification email to each member of this training requirement is determined here. Verify that the available options are correct for the members you want to assign this requirement to.

Requirement options are set here.

21. Select the checkbox to notify the member(s) by email of their new training requirement. Members must have their email address populated in their TWMS record.

22. You can add individual members by clicking the **Add** link next to their name or if all members in the resulting search are

## Find/Add Members - Audio/Video Maintenance

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | Manage Course Titles | **Find/Add Members** | Manage Current Members | Automation Rules

1. Find members (results only show members in your scope who have no record for this requirement)

First Name Last Name UIC Org Emp Type Sup Lvl

Series Desig Rate Bus BSO SMC Sort By

Search

2. Set requirement options and add members

Required: ☐ Yes ☒ No Reason not required: n/a ☒ Send Email Note to Member(s) Reply email: MANAGER.DEMO@NAVY

<< Previous Page 1 of 1 Next >>

(3) records found.

	Name	UIC	Assigned UIC	Org Code	Assigned Org	Type
Add	GERMANICUS, GAIUS	DEMO1	DEMO1	N60V	N64	CIVILIAN-APF
Add	MOHAMMAD, ZAHIRUDDIN	DEMO1	DEMO1	N6	N6	CIVILIAN-APF
Add	VESPASIAN, TITUS	DEMO1	DEMO1	n6	N61	CIVILIAN-APF

Add all members in search results >>

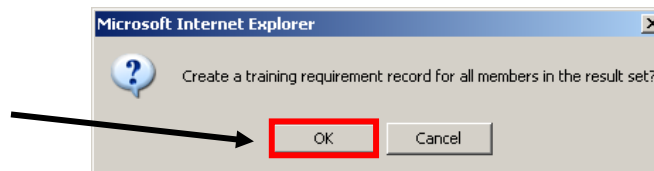
Only Civilian-APF employees in Org Code N6 are listed as a result of your search criteria.

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# Creating a Training Requirement

All employees in your scope who have already been assigned to this requirement will be displayed on the Manage Current Members form. There are currently three employees assigned to this requirement.

23. If all members were selected then click **OK**.



24. Click **Manage Current Members** to view the members just assigned to this requirement.

*Note: Here you can delete this requirement for all members or for an individual member. You can also edit the requirement for an individual member. For those who have not completed the requirement, a reminder email can be sent to them.*

## Manage Current Members - Audio/Video Maintenance

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | Manage Course Titles | Find/Add Members | **Manage Current Members** | Automation Rules

First Name | Last Name | UIC | Org | Type | Required | Sort

|  | Official |  |  | --ALL-- | --All-- | Last Name |

<< Previous | Page 1 of 1 | Next >>

(4) records found. | reply email: MANGER.DEMO@NAV | Email all not completed | Delete All

	Name	UIC	Assigned UIC	Org Code	Assigned Org	Type	Required	Reason	Complete	Email Reminder
<a href="#">Delete</a>   <a href="#">Edit</a>	GERMANICUS, GAUIS	DEMO1	DEMO1	N60V	N64	CIVILIAN-APF	Yes	n/a	No	<input type="button" value="Send"/>
<a href="#">Delete</a>   <a href="#">Edit</a>	MOHAMMAD, ZAHIRUDDIN	DEMO1	DEMO1	N6	N6	CIVILIAN-APF	Yes	n/a	No	<input type="button" value="Send"/>
<a href="#">Delete</a>   <a href="#">Edit</a>	VESPASIAN, TITUS	DEMO1	DEMO1	n6	N61	CIVILIAN-APF	Yes	n/a	No	<input type="button" value="Send"/>

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# Creating a Training Requirement

For each requirement, automation rules can be defined that will add or delete the training requirement as members meet or no longer meet the criteria of the defined rules.

25. Click **Automation Rules** to define how the requirement will be managed as employees move into and out of the organization.

*A rule will be defined that will add this training requirement if employees match the Org Code, N6. If an employee moves out of this Org Code then this training requirement will be deleted.*

26. Click the drop down arrow to select **ORG CODE**.
27. Enter the Org Code.
28. Click **Add Filter**.

## Automation Rules - Audio/Video Maintenance

[Search Requirements](#) [Create New Requirement](#) [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

[Add New:](#)

UIC  
UIC  
ORG CODE  
Employee Type  
Supervisor Level  
Series  
Designator  
Rate  
Bus Code

Is equal to

Add Filter

Include/Exclude

Value

No records found.

Page 1 of 0 (0 items)

## Automation Rules - Audio/Video Maintenance

[Search Requirements](#) [Create New Requirement](#) [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

[Add New:](#)

ORG CODE

Is equal to

N6

Add Filter

[Current Rules:](#)

Filter Type

Include/Exclude

Value

No records found.

Page 1 of 0 (0 items)



# Creating a Training Requirement

Many automation rules can be defined for one training requirement. Only the user who created the requirement will be able to delete the automation rules. If the creator is no longer assigned to the Command, please contact [TWMSAdministrator@navy.mil](mailto:TWMSAdministrator@navy.mil) to add their replacement.

The new rule will be listed here.

*Another rule will be defined that will add this training requirement if an employee is a Civilian-APF. If an employee is no longer a Civilian-APF then this training requirement will be deleted.*

29. Click the drop down arrow to select **Employee Type**.

## Automation Rules - Audio/Video Maintenance

[Search Requirements](#) [Create New Requirement](#) [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

Add New:

ORG CODE Is equal to Add Filter

Current Rules:

Filter Type	Include/Exclude	Value	
ORG	Is equal to	N6	Delete
1			

Page 1 of 1 (1 items)

## Automation Rules - Audio/Video Maintenance

[Search Requirements](#) [Create New Requirement](#) [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

Add New:

ORG CODE Is equal to Add Filter

Filter Type	Include/Exclude	Value	
ORG CODE	Is equal to	N6	Delete
1			

Page 1 of 1 (1 items)

# Creating a Training Requirement

All rules for this training requirement will be displayed as they are added.

30. Click the drop down arrow to select **Civilian-APF**.

## Automation Rules - Audio/Video Maintenance

[Search Requirements](#) | [Create New Requirement](#) | [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

Add New:

Employee Type | Is equal to | **CIVILIAN-APF** | Add Filter

Current Rules:

Filter Type	Include/Exclude	Value	
ORG	Is equal to	N6	Delete
1			

Page 1 of 1 (1 items)

31. Click **Add Filter**.

## Automation Rules - Audio/Video Maintenance

[Search Requirements](#) | [Create New Requirement](#) | [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

Add New:

Employee Type | Is equal to | CIVILIAN-APF | Add Filter

Current Rules:

Filter Type	Include/Exclude	Value	
EMPTYPE	Is equal to	CA	Delete
ORG	Is equal to	N6	Delete
1			

Page 1 of 1 (2 items)

32. Click **Requirement Details** to activate these rules.

The second rule will be listed here along with the one already defined.

# Creating a Training Requirement

After creating the automation rules for this requirement then they must be activated to take effect.

33. Select the **Enable auto create** checkbox to add members who, on a nightly basis, now satisfy the automation rules.
34. Select the **Enable auto remove** checkbox to remove members who, on a nightly basis, now don't satisfy the automation rules.

35. Click **Update Requirement**.

**Edit Requirement - Audio/Video Maintenance**

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | Manage Course Titles | Find/Add Members | Manage Current Members | Automation Rules

Requirement #: 74

Requirement Name: Audio/Video Maintenance

Description: This requirement will enable personnel to manage and troubleshoot the A/V requirements of their Command. Specific focus will be on Video Teleconferenc

Completion Date Type: Fiscal Year

Year: 2010

Which other training personnel can see this requirement?: UIC Wide | Select

Status: Active

Automation Rules Settings -

- ☒ Enable auto create ?
- ☒ Enable auto remove ?

Created By: MANAGER, DEMO  
MANAGER, DEMO

Update Requirement | Copy Requirement | Delete Requirement

**Auto Create**  
If enabled, a nightly process will evaluate the automation rules defined for this requirement and automatically add members who do not have the requirement but should based on the automation rules.

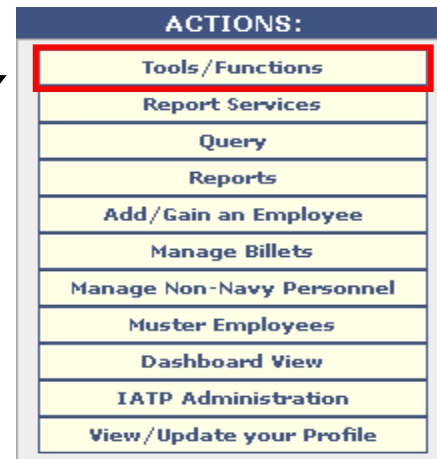
**Auto Delete**  
If enabled, a nightly process will evaluate the automation rules defined for this requirement and automatically remove members who have the requirement but should not based on the automation rules.

# Assigning Training From an Existing Requirement

TWMS allows you to assign a training requirement for others using an existing requirement that you did not create.

To assign to others a training requirement that already exists (but that you did not create):

1. From the Home Page click on the **Tools/Function** button on the Actions Menu.
2. From the Tools & Functions form choose the **Manage Training Requirements** button.



# Assigning Training From an Existing Requirement

A new window opens displaying the Training Requirements form. This form contains two tabs. One tab is labeled “Search Requirement” and is the default view. It lists the training requirements (not the training courses) you are able to view that have already been created (either by you or by someone else who has allowed you viewing rights). The other tab is labeled “Create New Requirement” and is used to create a new training requirement.

3. You can search for the requirement by entering one or more words of the title, the fiscal year that the requirement is due, and/or the status of the requirement. Click **Search** after making any entries. You can also scroll through the pages listing all the requirements or sort the listing differently. Default sort is by requirement name.

**Training Requirements**

Search Requirements Create New Requirement

Requirement: Diversity Fiscal Year: Status: Active Search

<< Previous Page 1 of 1 Next >> Sort by: Name

(3) records found.

ID	Requirement/Description	FY	Start Date	End Date	Created	Created By
26	DIVERSITY ALL-HANDS TRAINING	2009	1-Nov-2007	31-Oct-2009	20-Apr-2009	MANAGER, DEMO
84	Diversity Awareness To remain fully compliant, employees must complete the training within the prescribed, recurring, time period of once every 365 days.				17-Aug-2009	DANIEL, DEIGHAN
143	Diversity for all hands		1-Oct-2009	25-Nov-2009	16-Oct-2009	THOMAS, MCGARRY

This form has two tabs.

4. Once you have located the requirement then click anywhere within its row to

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# Assigning Training From an Existing Requirement

After selecting a requirement the Edit Requirement form is displayed. This form contains five additional tabs which will be used to view courses that will satisfy the requirement, assign people to the requirement, and view the automation rules of the requirement.

The name of the selected requirement is now displayed here.

This form contains five additional tabs.

5. Click **Manage Course Titles** to view the courses that will satisfy this requirement.

*Note: Unless you previously created this requirement you will not be able to change any of the information shown in this tab. Notice the dimmed buttons which disable any updates to the Requirement Details form.*

**Edit Requirement - DIVERSITY ALL-HANDS TRAINING**

Search Requirements | Create New Requirement | Edit Requirement

**Requirement Details** | Manage Course Titles | Find/Add Members | Manage Current Members | Automation Rules

Requirement # 26

Requirement Name DIVERSITY ALL-HANDS TRAINING

Description

Completion Date Type Custom Date Range

Start Date 11/01/2007

End Date 10/31/2009

Which other training personnel can see this requirement? BSO Wide

Status Active

Automation Rules Settings

☐ Enable auto create

☐ Enable auto remove

Created By: MANAGER.DEMO  
MANAGER.DEMO

Note! Only the creator of this requirement can make changes

Update Requirement | Copy Requirement | Delete Requirement

# Assigning Training From an Existing Requirement

The Manage Course Titles form now displays. All listed courses are those that will satisfy the training requirement. There is nothing you need to do here.

Completion of any one of these three courses listed here will satisfy this training requirement.

*Note: Only the creator of this requirement is able to add and/or delete courses.*

6. Click **Manage Current Members** to view employees within your scope who have already been assigned to this requirement.

## Manage Course Titles - DIVERSITY ALL-HANDS TRAINING

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | **Manage Course Titles** | Find/Add Members | **Manage Current Members** | Automation Rules

Selected titles that satisfy the requirement

☐ All

- ☐ **DIVERSITY ALL-HANDS TRAINING**  
Course ID: CPPD-GMT07-001  
Delivery Method: WEB  
Host: No Link Provided  
Url:
- ☐ **DIVERSITY AWARENESS TRNG**  
Course ID: DMGT-2101  
Delivery Method: CLS  
Host: No Link Provided  
Url:
- ☐ **DIVERSITY: WHAT EMPLOYEES SHOULD KNOW**  
Course ID: 47009  
Delivery Method: WEB  
Host: No Link Provided  
Url:

# Assigning Training From an Existing Requirement

All employees in your scope who have already been assigned to this requirement will be displayed on the Manage Current Members form. There are currently three employees assigned to this requirement.

7. Click **Find/Add Members** to assign other employees to this requirement.

*Note: You can search for currently assigned members by entering their first name, last name, UIC, Org, Employee Type, etc. You can also scroll through the pages listing all the members or sort the members differently. Default sort is by last name.*

## Manage Current Members - DIVERSITY ALL-HANDS TRAINING

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | Manage Course Titles | **Find/Add Members** | Manage Current Members | Automation Rules

First Name | Last Name | UIC | Org | Type | Required | Sort | Search

<< Previous | Page 1 of 1 | Next >>

(3) records found. | reply email: MICHAEL.C.WOLFE@ | Email all not completed | Delete All

	Name	UIC	Assigned UIC	Org Code	Assigned Org	Type	Required	Reason	Complete	Email Reminder
<a href="#">Delete</a>   <a href="#">Edit</a>	BRUCE, JAMES	DEMO1	DEMO1	N41	N41	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	EMELIANENKO, FEDOR	DEMO1	DEMO1	N4	N4	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	MERRIK, JOSEPH	DEMO1	DEMO1	N41	N41	CIVILIAN-APF	Yes	n/a	No	<a href="#">Send</a>

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# Assigning Training From an Existing Requirement

In the Find/Add Members form you can search for employees within your scope of access. Results of your search will display only those employees that are not currently assigned to this training requirement.

*Note: You can search for employees to assign to this requirement by entering any combination of their first name, last name, UIC, Org, Employee Type, etc. You can also sort the results of your search in different ways. Default sort is by last name.*

8. Click **Search** after you have entered your search criteria.

## Find/Add Members - DIVERSITY ALL-HANDS TRAINING

[Search Requirements](#) [Create New Requirement](#) [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

**1. Find members** (results only show members in your scope who have no record for this requirement)

First Name Last Name UIC Official --View All-- Select Org N1 --View All-- Select Emp Type Sup Lvl --ALL--

Series Design Rate Bus BSO SMC Sort By Last Name Search

**2. Set requirement options and add members**

Required: Yes Reason not required: n/a ☐ Send Email Note to Member(s) Reply email: MANAGER.DEMO@NAV

<< Previous Page 0 of 0 Next >>

Add all members in search results >>

Name	UIC	Assigned UIC	Org Code	Assigned Org	Type
------	-----	--------------	----------	--------------	------

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# Assigning Training From an Existing Requirement

You can now set any requirement options for each member of your search results. The default option is that this training is required, however, there could be circumstances where a requirement is assigned to a member but they are not required to fulfill it. Verify that the available options are correct for the members you want to add for this requirement. Requirement options are set here.

9. You can add individual members by clicking the **Add** link next to their name or if all members in the resulting search are required to take this training then click the **Add all members in search results** link.

Find/Add Members - DIVERSITY ALL-HANDS TRAINING

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | Manage Course Titles | Find/Add Members | Manage Current Members | Automation Rules

1. Find members (results only show members in your scope who have no record for this requirement)

First Name Last Name UIC Org Emp Type Sup Lvl

Series Desig Rate Bus BSO SMC Sort By

Search

2. Set requirement options and add members

Required: Yes Reason not required: n/a ☐ Send Email Note to Member(s) Reply email: MANAGER.DEMO@NAV

<< Previous Page 1 of 1 Next >>

(4) records found.

	Name	UIC	Assigned UIC	Org Code	Assigned Org	Type
Add	GUEVARA, ERNESTO	DEMO1	DEMO1	N1	N1	ACTIVE DUTY
Add	SOZE, KEYSER	DEMO1	DEMO1	N1	N12	ACTIVE DUTY
Add	SWIFT, ROB	DEMO1	DEMO1	N12	N12	ACTIVE DUTY
Add	SYRACUSE, ARCHIMEDES	DEMO1	DEMO1	N13	N13	CONTRACTOR

Microsoft Internet Explorer

Create a training requirement record for all members in the result set?

OK Cancel

10. If all members were selected

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Returning to the Manage Current Members form now displays the four members that were just assigned to this training requirement in addition to the three members already assigned.

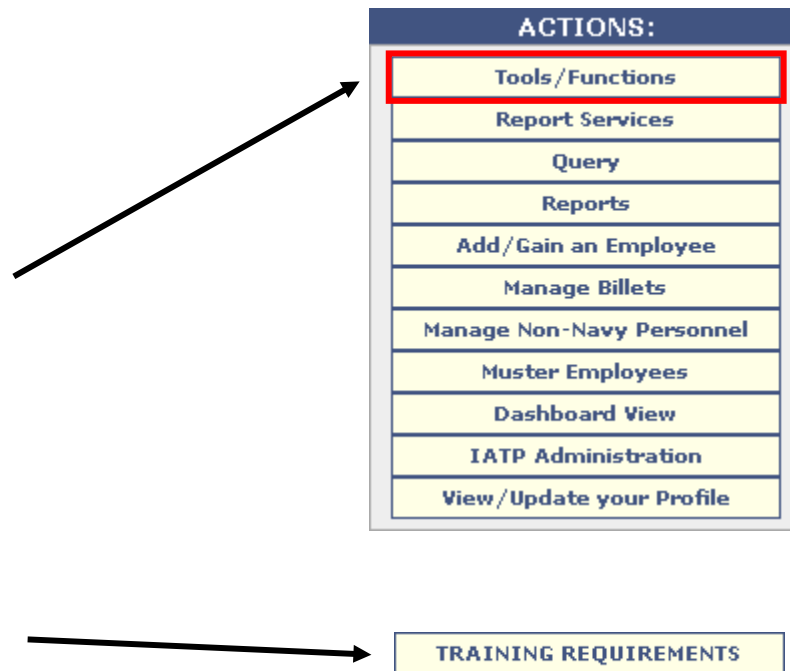
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# Editing Training Requirements

TWMS allows you to edit a training requirement that you have already created. For example, you can change the dates of the requirement, add or delete course that will satisfy the requirement, or reset the automation rules of the requirement.

To edit a training requirement that you created:

1. From the Home Page click on the **Tools/Function** button on the Actions Menu.
2. From the Tools & Functions form choose the **Training Requirements** button.



# Editing Training Requirements

A new window opens displaying the Training Requirements form. This form contains two tabs. One tab is labeled “Search Requirement” and is the default view. It lists the training requirements (not the training courses) you are able to view that have already been created (either by you or by someone else who has allowed you viewing rights). The other tab is labeled “Create New Requirement” and is used to create a new training requirement.

3. You can search for the requirement by entering one or more words of the title, the fiscal year that the requirement is due, and/or the status of the requirement. Click **Search** after making any entries. You can also scroll through the pages listing all the requirements or sort the listing differently. Default sort is by requirement name.

## Training Requirements

Search Requirements Create New Requirement

This form has two tabs.

Requirement	Fiscal Year	Status				
Diversity		Active	Search			
<< Previous Page 1 of 1 Next >>			Sort by: Name			
(3) records found.						
ID	Requirement/Description	FY	Start Date	End Date	Created	Created By
26	DIVERSITY ALL-HANDS TRAINING	2009	1-Nov-2007	31-Oct-2009	20-Apr-2009	MANAGER, DEMO
84	Diversity Awareness				17-Aug-2009	DANIEL, DEIGHAN
143	Diversity for all hands		1-Oct-2009	25-Nov-2009	16-Oct-2009	THOMAS, MCGARRY

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4. Once you have located the requirement then click anywhere within its row to

# Editing Training Requirements

After selecting a requirement the Edit Requirement form is displayed. This form contains five additional tabs which will be used to view/manage courses, assign employees, and view/manage the automation rules of this training requirement. The default view is the “Requirement Details” tab. <sup>The name of the selected requirement is now displayed here.</sup>

This form contains five additional tabs.

**Edit Requirement - DIVERSITY ALL-HANDS TRAINING**

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | Manage Course Titles | Find/Add Members | Manage Current Members | Automation Rules

Requirement # 26

Requirement Name DIVERSITY ALL-HANDS TRAINING

Description

Completion Date Type Custom Date Range

Start Date 11/01/2007

End Date 10/31/2009

Which other training personnel can see this requirement? BSO Wide

Status Active

Automation Rules Settings -

☐ Enable auto create ?

☐ Enable auto remove ?

Created By: MANAGER: DEMO  
MANAGER: DEMO

Update Requirement | Copy Requirement | Delete Requirement

*Note: Since this is a requirement you created you are able to change any of the information shown in this tab.*

# Editing Training Requirements

Because you created this training requirement you are able to change any of its details. These changes will be reflected for anyone who you allow to view the requirement as well as for those members who have been selected to complete it.

5. After making any changes to the details of this requirement, click the **Update Requirement** button.

*Note: You also can copy this requirement if the details are similar to a new one. The Requirement Name and completion date, for example, may be the only changes that are required. You can also delete this requirement.*

6. Click **Manage Course Titles** to view and/or manage the courses that will satisfy this requirement.

**Edit Requirement - DIVERSITY ALL-HANDS TRAINING**

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | **Manage Course Titles** | Find/Add Members | Manage Current Members | Automation Rules

Requirement # 26

Requirement Name DIVERSITY ALL-HANDS TRAINING

Description

Completion Date Type Custom Date Range

Start Date 10/01/2009

End Date 09/30/2010

Which other training personnel can see this requirement? BSO Wide

Status Active

Automation Rules Settings

☐ Enable auto create

Created By: MANAGER, DEMO  
MANAGER, DEMO  
MICHAEL.C.WOLFE@NAVY.MIL

**Update Requirement** | Copy Requirement | Delete Requirement

# Editing Training Requirements

The Manage Course Titles form now displays. Courses listed on the right are the current courses that will satisfy the training requirement.

7. If other courses will satisfy this requirement then enter either the Course ID# or Course Title (or a part of it) and then click **Find**. Courses matching your criteria will display.

**Manage Course Titles - DIVERSITY ALL-HANDS TRAINING**

[Search Requirements](#) | [Create New Requirement](#) | [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

**Find a Course**

Course ID#

Course Title (separate multiple terms with a semicolon)

**Find**

**Selected titles that satisfy the requirement**

☐ All [<< Remove Checked Courses](#)

- ☐ **DIVERSITY ALL-HANDS TRAINING**  
Course ID: CPPD-GMT07-001  
Delivery Method: WEB  
Host: No Link Provided  
Url:
- ☐ **DIVERSITY AWARENESS TRNG**  
Course ID: DMGT-2101  
Delivery Method: CLS  
Host: No Link Provided  
Url:
- ☐ **DIVERSITY: WHAT EMPLOYEES SHOULD KNOW**  
Course ID: 47009  
Delivery Method: WEB  
Host: No Link Provided  
Url:

8. Click the **Add** button next to a course name to add it to the list of courses that will satisfy this requirement.

**Manage Course Titles - DIVERSITY ALL-HANDS TRAINING**

[Search Requirements](#) | [Create New Requirement](#) | [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

**Find a Course**

Course ID#

Course Title (separate multiple terms with a semicolon)

**Find**

Hosted on TWMS: No

- ☐ **MANAGING DIVERSITY IN THE WORKPLACE**  
Course ID: DCPDS-88559  
Delivery Method: APF  
Hosted on TWMS: No
- ☐ **MANAGING DIVERSITY SIMULATION**  
Course ID: HR0020  
Delivery Method: WEB  
Hosted on TWMS: No
- ☐ **Managing Workforce Diversity**  
Course ID: EEOPT001D

**Selected titles that satisfy the requirement**

☐ All [<< Remove Checked Courses](#)

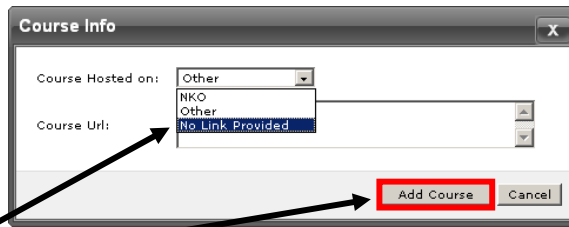
- ☐ **DIVERSITY ALL-HANDS TRAINING**  
Course ID: CPPD-GMT07-001  
Delivery Method: WEB  
Host: No Link Provided  
Url:
- ☐ **DIVERSITY AWARENESS TRNG**  
Course ID: DMGT-2101  
Delivery Method: CLS  
Host: No Link Provided  
Url:
- ☐ **DIVERSITY: WHAT EMPLOYEES SHOULD KNOW**  
Course ID: 47009  
Delivery Method: WEB  
Host: No Link Provided  
Url:



# Editing Training Requirements

If TWMS does not host the selected course then you can select where it is hosted and also provide a web link, if known. For each member who views this requirement, the link will then be displayed for them to begin the course.

9. If you know where the course is hosted then choose that option and also provide the course URL. If you don't know where the course is hosted then select **No Link Provided**.



The 'Course Info' dialog box has a 'Course Hosted on:' dropdown menu with options: 'Other', 'NKO', 'Other', and 'No Link Provided'. The 'No Link Provided' option is selected. Below the dropdown is a 'Course Url:' text field. At the bottom right are 'Add Course' and 'Cancel' buttons. An arrow points from the text 'No Link Provided' in the text block to the 'No Link Provided' option in the dropdown.

If a course needs to be removed then check the box next to its title and then click the

**<<Remove Checked Courses** link.

10. Click **Add Course**.

## Manage Course Titles - DIVERSITY ALL-HANDS TRAINING

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | **Manage Course Titles** | Find/Add Members

**Manage Current Members** | Automation Rules

### Find a Course

Course ID#  Course Title (separate multiple terms with a semicolon)  Find

- ☐ **MANAGING DIVERSITY SIMULATION**  
Course ID: HR0020  
Delivery Method: WEB  
Hosted on TWMS: No
- ☐ **Managing Workforce Diversity**  
Course ID: EFSP7001D  
Delivery Method: FCT  
Hosted on TWMS: No
- ☐ **NAVSEA DIVERSITY SUMMIT**  
Course ID: DCPDS-81639  
Delivery Method: APF  
Hosted on TWMS: No
- ☐ **RESPECTING DIVERSITY WORKSHOP**  
Course ID: DCPDS-87043  
Delivery Method: APF  
Hosted on TWMS: No
- ☐ **SOC315 CULTURAL DIVERSITY**  
Course ID: DCPDS-77834  
Delivery Method: APF

### Selected titles that satisfy the requirement

☐ All << Remove Checked Courses

- ☐ **DIVERSITY ALL-HANDS TRAINING**  
Course ID: CPPD-GMT07-001  
Delivery Method: WEB  
Host: No Link Provided  
Url:
- ☐ **DIVERSITY AWARENESS TRNG**  
Course ID: DMGT-2101  
Delivery Method: CLS  
Host: No Link Provided  
Url:
- ☐ **DIVERSITY: WHAT EMPLOYEES SHOULD KNOW**  
Course ID: 47009  
Delivery Method: WEB  
Host: No Link Provided  
Url:
- ☐ **MANAGING DIVERSITY IN THE WORKPLACE**  
Course ID: DCPDS-88559  
Delivery Method: APF  
Host: No Link Provided  
Url:

11. Click **Manage Current Members** to view employees within your scope who have already been assigned to this requirement.

The new course satisfying this requirement is now listed here.

# Editing Training Requirements

All employees in your scope who have already been assigned to this requirement will be displayed on the Manage Current Members form. There are currently seven employees assigned to this requirement.

12. Click **Find/Add Members** to assign other employees to this requirement.

*Note: You can search for currently assigned members by entering their first name, last name, UIC, Org, Employee Type, etc. You can also scroll through the pages listing all the members or sort the members differently. Default sort is by last name.*

## Manage Current Members - DIVERSITY ALL-HANDS TRAINING

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | Manage Course Titles | **Find/Add Members** | Manage Current Members | Automation Rules

First Name |  Last Name |  UIC |  Org |  Type |  Required |  Sort |

<< Previous | Page 1 of 1 | Next >>

(8) records found. reply email: MICHAEL.C.WOLFE@ | Email all not completed | Delete All

	Name	UIC	Assigned UIC	Org Code	Assigned Org	Type	Required	Reason	Complete	Email Reminder
<a href="#">Delete</a>   <a href="#">Edit</a>	BRUCE, JAMES	DEMO1	DEMO1	N41	N41	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	EMELIANENKO, FEDOR	DEMO1	DEMO1	N4	N4	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	GUEVARA, ERNESTO	DEMO1	DEMO1	N1	N1	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	MERRIK, JOSEPH	DEMO1	DEMO1	N41	N41	CIVILIAN-APF	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	SOZE, KEYSER	DEMO1	DEMO1	N1	N12	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	SWIFT, ROB	DEMO1	DEMO1	N12	N12	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	SYRACUSE, ARCHIMEDES	DEMO1	DEMO1	N13	N13	CONTRACTOR	Yes	n/a	No	<a href="#">Send</a>

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# Editing Training Requirements

In the Find/Add Members form you can search for employees within your scope of access. Results of your search will display only those employees that are not currently assigned to this training requirement.

*Note: You can search for employees to assign to this requirement by entering any combination of their first name, last name, UIC, Org, Employee Type, etc. You can also sort the results of your search in different ways. Default sort is by last name.*

13. Here we will search by UIC. Click **Select** to filter the UIC(s) to search upon.

## Find/Add Members - DIVERSITY ALL-HANDS TRAINING

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | Manage Course Titles | Find/Add Members | Manage Current Members | Automation Rules

1. Find members (results only show members in your scope who have no record for this requirement)

First Name Last Name UIC Official Filter by UICs Select Org Emp Type Sup Lvl

Series Desig Rate Bus BSO SMC Sort by Last Name Search

2. Set requirement options and add members

Required: Yes Reason not required: n/a Send Email Note to Member(s) Reply email: MANAGER.DEMO@NAV

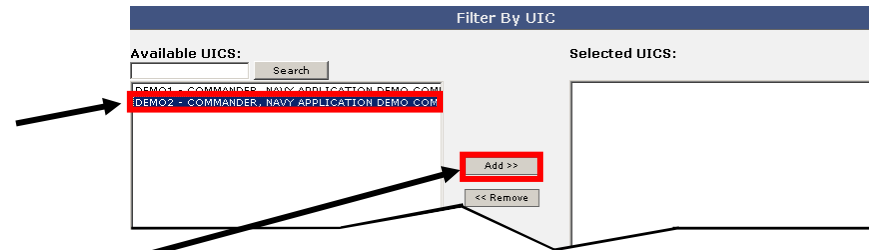
<< Previous Page 0 of 0 Next >> Add all members in search results >>

Name	UIC	Assigned UIC	Org Code	Assigned Org	Type
------	-----	--------------	----------	--------------	------

# Editing Training Requirements

All available UIC(s) within your scope of access will be displayed.

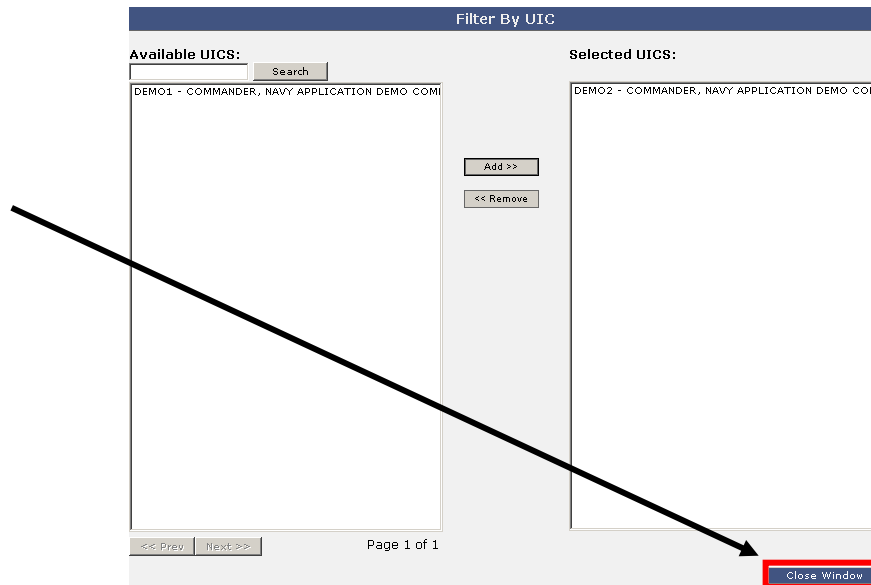
14. Search for the UIC you would like to filter in your employee search and then click its name to select it.



15. Click **Add** to move it to the list of selected UIC(s).

16. Repeat steps 14-15 to add other UIC(s).

17. Click the **Close Window** button.



# Editing Training Requirements

18. Enter other search criteria as needed and then click the **Search** button.

## Find/Add Members - DIVERSITY ALL-HANDS TRAINING

[Search Requirements](#)   [Create New Requirement](#)   [Edit Requirement](#)

Requirement Details | Manage Course Titles | **Find/Add Members** | Manage Current Members | Automation Rules

1. Find members (results only show members in your scope who have no record for this requirement)

First Name	Last Name	UIC	Org	Emp Type	Sup Lvl
<input type="text"/>	<input type="text"/>	Official <input type="button" value="v"/>	Filter by Org <input type="button" value="v"/> Select	No <input type="button" value="v"/> --View All-- <input type="button" value="v"/> Select	--ALL-- <input type="button" value="v"/>
Series	Desig	Rate	Bus	BSO	SMC
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sort By					Last Name <input type="button" value="v"/>
<input type="button" value="Search"/>					

2. Set requirement options and add members

Required: Yes  Reason not required: n/a  ☐ Send Email Note to Member(s) Reply email: MICHAEL.C.WOLFE@N.

<< Previous Page 0 of 0 Next >>

Add all members in search results >>

Name	UIC	Assigned UIC	Org Code	Assigned Org	Type
------	-----	--------------	----------	--------------	------

# Editing Training Requirements

You can now set any requirement options for each member of your search results. For example, the default option is that this training is required, however, there could be circumstances where a requirement is assigned to a member but they are not required to fulfill it. Verify that the available options are correct before you add the members to this requirement.

Requirement options are set here.

19. You can add individual members by clicking on **Add** next to their name or if all members in the resulting search are required to take this training then click the **Add all members in search results** link.

## Find/Add Members - DIVERSITY ALL-HANDS TRAINING

[Search Requirements](#) [Create New Requirement](#) [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

### 1. Find members (results only show members in your scope who have no record for this requirement)

First Name	Last Name	UIC	Org	Emp Type	Sup Lvl
<input type="text"/>	<input type="text"/>	Official <input type="button" value="Filter by UICs"/> <input type="button" value="Select"/>	N6	--View All-- <input type="button" value="Select"/>	--ALL-- <input type="button" value="Select"/>
Series	Desig	Rate	Bus	BSO	SMC
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sort By					<input type="button" value="Search"/>
<input type="text" value="Last Name"/>					

### 2. Set requirement options and add members

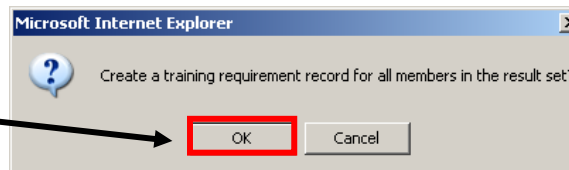
Required: ☒ Yes ☐ Reason not required:  ☐ Send Email Note to Member(s) Reply email:

<< Previous Page 1 of 1 Next >>

(3) records found.

	Name	UIC	Assigned UIC	Org Code	Assigned Org	Type
<input checked="" type="checkbox"/>	CARR, MARINA	DEMO2	DEMO2	N63	N63	CONTRACTOR
<input checked="" type="checkbox"/>	HUME, DAVID	DEMO2	DEMO2	N6	N64	ACTIVE DUTY
<input checked="" type="checkbox"/>	JONES, DAVID	DEMO2	DEMO2	N6	N64	ACTIVE DUTY

[Add all members in search results >>](#)



20. If all members are selected then click **OK**.

# Editing Training Requirements

Returning to the Manage Current Members form now displays the three members that were just assigned to this training requirement in addition to the seven members already assigned.

All members are displayed here.

## Manage Current Members - DIVERSITY ALL-HANDS TRAINING

[Search Requirements](#) [Create New Requirement](#) [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

First Name

Last Name

UIC

Org

Type

Required

Search

Official

--ALL--

--All--

Last Name

Search

<< Previous

Page 1 of 1

Next >>

(11) records found.

Reply email: MANAGER.DEMO@NA

Email all not completed

Delete All

	Name	UIC	Assigned UIC	Org Code	Assigned Org	Type	Required	Reason	Complete	Email Reminder
<a href="#">Delete</a>   <a href="#">Edit</a>	BRUCE, JAMES	DEMO1	DEMO1	N41	N41	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	CARR, MARINA	DEMO2	DEMO2	N63	N63	CONTRACTOR	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	EMELIANENKO, FEDOR	DEMO1	DEMO1	N4	N4	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	GUEVARA, ERNESTO	DEMO1	DEMO1	N1	N1	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	HUME, DAVID	DEMO2	DEMO2	N6	N64	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	JONES, DAVID	DEMO2	DEMO2	N6	N64	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	MERRIK, JOSEPH	DEMO1	DEMO1	N41	N41	CIVILIAN-APP	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	SOZE, KEYSER	DEMO1	DEMO1	N1	N12	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	SWIFT, ROB	DEMO1	DEMO1	N12	N12	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	SYRACUSE, ARCHIMEDES	DEMO1	DEMO1	N13	N13	CONTRACTOR	Yes	n/a	No	<a href="#">Send</a>

21. Click **Automation Rules** to define how the requirement will be managed as employees move into and out of the organization.

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# Editing Training Requirements

For each requirement, automation rules can be defined that will add or delete the training requirement as members meet or no longer meet the criteria of the defined rules.

*A new rule will be defined that will add this training requirement if employees match the UICs, DEMO1 and DEMO2. If an employee moves into or out of these UICs then this training requirement will be added or deleted respectively. Since UIC is the default filter on this form, enter the name of the UIC, DEMO1.*

23. Click **Add Filter**.

24. Repeat steps 22-23 for DEMO2.

25. Select **Requirement Details** to turn on these

The new rules will be listed here.

## Automation Rules - DIVERSITY ALL-HANDS TRAINING

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | Manage Course Titles | Find/Add Members | Manage Current Members | Automation Rules

Add New:

UIC | Is equal to | DEMO1 | Add Filter

Current Rules:

Filter Type	Include/Exclude	Value	
EMPTYTYPE	Is equal to	CA	Delete
ORG	Is equal to	N6	Delete

1

Page 1 of 1 (2 items)

## Automation Rules - DIVERSITY ALL-HANDS TRAINING

Search Requirements | Create New Requirement | Edit Requirement

Requirement Details | Manage Course Titles | Find/Add Members | Manage Current Members | Automation Rules

Add New:

UIC | Is equal to | | Add Filter

Current Rules:

Filter Type	Include/Exclude	Value	
EMPTYTYPE	Is equal to	CA	Delete
ORG	Is equal to	N6	Delete
UIC	Is equal to	DEMO1	Delete
UIC	Is equal to	DEMO2	Delete

1

Page 1 of 1 (4 items)



# Editing Training Requirements

After creating the automation rules for this requirement then they must be activated to take effect.

26. Select the **Enable auto create** checkbox to add members who, on a nightly basis, now satisfy the automation rules.

27. Select the **Enable auto remove** checkbox to remove members who, on a nightly basis, now don't satisfy the automation rules.

28. Click **Update Requirement**.

## Edit Requirement - DIVERSITY ALL-HANDS TRAINING

[Search Requirements](#) [Create New Requirement](#) [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

Requirement #

Requirement Name

Description

Completion Date Type

Start Date

End Date

Which other training personnel can see this requirement?

Status

**Automation Rules Settings**

☒ Enable auto create ?

☒ Enable auto remove ?

Created By: MANAGER, DEMO  
MANAGER, DEMO

**Update Requirement**

Copy Requirement

Delete Requirement

**Auto Create**  
If enabled, a nightly process will evaluate the automation rules defined for this requirement and automatically add members who do not have the requirement but should based on the automation rules.

**Auto Delete**  
If enabled, a nightly process will evaluate the automation rules defined for this requirement and automatically remove members who have the requirement but should not based on the automation rules.

# Viewing Training Requirements

Information about an employee's required training can be managed and viewed in the employee's training form.

To view required training for an employee\*:

1. Once an employee has been selected, click the **Training/Educ/Cert & Skills** button to display the Completed Training form shown here.

*Note: The default view of the Training form shows the training courses this employee has completed within the last two years.*

2. Click **Training Requirements** to display the required courses for

*\*You must have the appropriate access level to view the training information for an employee.*

**Total Workforce Management Services (TWMS)**  
Workforce Manager 2.0 // Login: MANAGER.DEMO Access Level: MANAGER

Completed Training

\*\* FOR OFFICIAL USE ONLY - PRIVACY ACT SENSITIVE \*\*  
\*\* Any misuse or unauthorized disclosure of this information may result in both civil and criminal penalties \*\*

**NAVIGATION:**

- Home
- Login/Logout
- General Information
- Assignment/Position Info
- IA/Deployment/TAD Info
- OPNAV 5239/SAAR-N Form
- IA Prescreening
- Training/Educ/Cert & Skills**
- Awards/Quals Info
- Personal/Recall Information
- Security Clearance Info
- IA Workforce Info
- Assigned Assets
- Uploaded Documents

**NAME** BRUCE, JAMES AC2 **OFFICIAL RECORD UIC/ORG** DEMO1 / N41 **ASSIGNED-MUSTER UIC/ORG** DEMO1 / N41 **EMPLOYEE TYPE** ACTIVE DUTY

**TITLE** E-5 **PAY GRADE** ENLISTED **MILITARY TYPE**

**TRAINING** CERTIFICATIONS AGREEMENTS EDUCATION LANGUAGES SKILLS

Completed Training • Training Archive • **Training Requirements** Projected Training

Add a Training Record

Print/Export Training History: Excel PDF

Completed Training for the past 2 years.  
For training older than 2 years, click on Training Archive

Sort: Date Completed Desc Sort

Course Title	Course ID	Training Data Source	Date Completed	Hours
No Data Found				

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# Viewing Training Requirements

All requirements for this employee will be listed. Additional details of each of the required courses can be viewed here.

3. Click **Detail** to view other information about a training requirement.

*Note: The “Diversity All-Hands Training” requirement is the requirement that was previously added for this employee.*

NAME	OFFICIAL RECORD UIC/ORG	ASSIGNED-MUSTER UIC/ORG	EMPLOYEE TYPE
BRUCE, JAMES AC2	DEMO1 / N41	DEMO1 / N41	ACTIVE DUTY

TITLE	PAY GRADE	MILITARY TYPE
	E-5	ENLISTED

TRAINING ▾ CERTIFICATIONS AGREEMENTS EDUCATION LANGUAGES SKILLS

Completed Training • Training Archive • Training Requirements • Projected Training

REQUIREMENTS							
	REQUIREMENT	START	END	REQUIRED	REASON NOT REQUIRED	COMPLETED	DATE COMPLETED
<a href="#">Detail</a>	DIVERSITY ALL-HANDS TRAINING	10/1/2009	9/30/2010	Yes	n/a	No	--
<a href="#">Detail</a>	ANNUAL DOD PRIVACY (PII) TRAINING	1/1/2009	12/31/2009	Yes	n/a	No	--
<a href="#">Detail</a>	Constitution Training	9/1/2009	9/18/2009	Yes	n/a	No	--
<a href="#">Detail</a>	Training of TWMS' "Requirements Training"	11/1/2009	10/31/2010	Yes	n/a	No	--

Manage Required Courses

4. Details of this requirement will be displayed in this new window including the list of courses that will satisfy the requirement. Click **Close Window** when you are finished.

Close Window X

REQUIREMENT DETAILS	
Requirement Name	DIVERSITY ALL-HANDS TRAINING
Requirement Description	
Start Date	10/1/2009
End Date	9/30/2010

COURSES WHICH SATISFY THE REQUIREMENT	
COURSE ID	COURSE TITLE
CPPD-GMT07-001	DIVERSITY ALL-HANDS TRAINING
47009	DIVERSITY: WHAT EMPLOYEES SHOULD KNOW
DMGT-2101	DIVERSITY AWARENESS TRNG
DCPDS-88559	MANAGING DIVERSITY IN THE WORKPLACE

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# Managing Training Requirements

If you have the appropriate permissions, you can also manage a required course by deleting it or changing the status of the requirement for the employee.

To manage a training requirement for an employee\*:

1. From the Training Requirements form of the employee's training record, click **Manage Required Courses**.

2. Here you can add a new training requirement, remove a requirement, or edit the information about the status of a requirement. Click the **Edit** link corresponding to the training requirement you want to make changes to.

\*You must have the appropriate access level to view the training information for an employee.

NAME	OFFICIAL RECORD UIC/ORG	ASSIGNED-MUSTER UIC/ORG	EMPLOYEE TYPE
BRUCE, JAMES AC2	DEMO1 / N41	DEMO1 / N41	ACTIVE DUTY

TITLE	PAY GRADE	MILITARY TYPE
	E-5	ENLISTED

**TRAINING** ▾ CERTIFICATIONS AGREEMENTS EDUCATION LANGUAGES SKILLS

Completed Training • Training Archive • **Training Requirements** • Projected Training

REQUIREMENTS							
	REQUIREMENT	START	END	REQUIRED	REASON NOT REQUIRED	COMPLETED	DATE COMPLETED
<a href="#">Detail</a>	DIVERSITY ALL-HANDS TRAINING	10/1/2009	9/30/2010	Yes	n/a	No	--
<a href="#">Detail</a>	ANNUAL DOD PRIVACY (PII) TRAINING	1/1/2009	12/31/2009	Yes	n/a	No	--
<a href="#">Detail</a>	Constitution Training	9/1/2009	9/18/2009	Yes	n/a	No	--
<a href="#">Detail</a>	Training of TWMS' "Requirements Training"	11/1/2009	10/31/2010	Yes	n/a	No	--

**Manage Required Courses**

Close Window X

Requirement Required Reason Not Required

DIVERSITY ALL-HANDS TRAINING	Yes	n/a	<a href="#">Remove</a> <a href="#">Edit</a>
ANNUAL DOD PRIVACY (PII) TRAINING	Yes	n/a	<a href="#">Remove</a> <a href="#">Edit</a>
Constitution Training	Yes	n/a	<a href="#">Remove</a> <a href="#">Edit</a>
Training of TWMS' "Requirements Training"	Yes	n/a	<a href="#">Remove</a> <a href="#">Edit</a>

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# Managing Training Requirements

Here you can add or remove the training requirement. You can also change the status of the training requirement and also provide a reason for the change of status.

- Click the left drop down arrow and choose **No**. This indicates that this requirement is not required for this employee.

*Note: The Diversity All-Hands Training requirement is the requirement that was previously added for this employee.*

- Click the right drop down arrow and select the appropriate reason for the change of status for this employee.

The screenshot shows a web application window titled 'Close Window X'. It contains a table with training requirements. The first row, 'DIVERSITY ALL-HANDS TRAINING', is highlighted in yellow. Its 'Required' status is set to 'No' (indicated by a red box and an arrow from the instruction). The 'Reason Not Required' is 'n/a'. Other rows include 'ANNUAL DOD PRIVACY (PII) TRAINING', 'Constitution Training', and 'Training of TWMS' "Requirements Training"', all with 'Yes' status and 'n/a' reason.

Requirement	Required	Reason Not Required		
DIVERSITY ALL-HANDS TRAINING	No	n/a	Remove	Save Cancel
ANNUAL DOD PRIVACY (PII) TRAINING	Yes	n/a	Remove	Edit
Constitution Training	Yes	n/a	Remove	Edit
Training of TWMS' "Requirements Training"	Yes	n/a	Remove	Edit

The screenshot shows the same web application window. The 'DIVERSITY ALL-HANDS TRAINING' row is highlighted. The 'Required' status is 'No'. The 'Reason Not Required' dropdown is open, showing a list of reasons. The reason 'Detached/Departing Command within 30 days' is highlighted with a red box and an arrow from the instruction. Other reasons include 'Access Revoked/Training noncompliant', 'Not a Supervisor', 'No access to Classified Information', 'No Access to Navy IT', 'Medical Leave', 'Defrocked', 'TAD', 'Deployed', and 'Terminal Leave'.

Requirement	Required	Reason Not Required		
DIVERSITY ALL-HANDS TRAINING	No	Detached/Departing Command within 30 days	Remove	Save Cancel
ANNUAL DOD PRIVACY (PII) TRAINING	Yes		Remove	Edit
Constitution Training	Yes		Remove	Edit
Training of TWMS' "Requirements Training"	Yes		Remove	Edit

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# Managing Training Requirements

Changing the requirement status here for an employee is identical to being able to change it for the member while creating or editing the training requirement.

- Click **Save** to accept these changes or **Cancel** to disregard them.

Requirement	Required	Reason Not Required	
DIVERSITY ALL-HANDS TRAINING	No	Detached/Departing Command within 30 days	Remove Save Cancel
ANNUAL DOD PRIVACY (PII) TRAINING	Yes	n/a	Remove Edit
Constitution Training	Yes	n/a	Remove Edit
Training of TWMS' "Requirements Training"	Yes	n/a	Remove Edit

NAME	OFFICIAL RECORD UIC/ORG	ASSIGNED-MUSTER UIC/ORG	EMPLOYEE TYPE
BRUCE, JAMES AC2	DEMO1 / N41	DEMO1 / N41	ACTIVE DUTY

TITLE	PAY GRADE	MILITARY TYPE
	E-5	ENLISTED

TRAINING	CERTIFICATIONS	AGREEMENTS	EDUCATION	LANGUAGES	SKILLS
Completed Training	Training Archive	Training Requirements	Projected Training		

*Note: The Training Requirements form for the employee now shows that this requirement is not required and displays the reason why it's not.*

REQUIREMENTS							
	REQUIREMENT	START	END	REQUIRED	REASON NOT REQUIRED	COMPLETED	DATE COMPLETED
<a href="#">Detail</a>	DIVERSITY ALL-HANDS TRAINING	10/1/2009	9/30/2010	No	Detached/Departing Command within 30 days	No	--
<a href="#">Detail</a>	ANNUAL DOD PRIVACY (PII) TRAINING	1/1/2009	12/31/2009	Yes	n/a	No	--
<a href="#">Detail</a>	Constitution Training	9/1/2009	9/18/2009	Yes	n/a	No	--
<a href="#">Detail</a>	Training of TWMS' "Requirements Training"	11/1/2009	10/31/2010	Yes	n/a	No	--

Manage Required Courses

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# Managing Training Requirements

Returning to the Manage Current Members form of this training requirement also shows for this employee that the training is not required. Changing the requirement status can also be processed here.

The status of the requirement and the reason is displayed here.

## Manage Current Members - DIVERSITY ALL-HANDS TRAINING

[Search Requirements](#) [Create New Requirement](#) [Edit Requirement](#)

[Requirement Details](#) | [Manage Course Titles](#) | [Find/Add Members](#) | [Manage Current Members](#) | [Automation Rules](#)

First Name Last Name Official  UIC  Org  Type  Required  Sort  Search

<< Previous Page 1 of 1 Next >>

(11) records found.

reply email:  MANAGER.DEMO@NA

Email all not completed

Delete All

	Name	UIC	Assigned UIC	Org Code	Assigned Org	Type	Required	Reason	Complete	Email Reminder
<a href="#">Delete</a>   <a href="#">Edit</a>	BRUCE, JAMES	DEMO1	DEMO1	N41	N41	ACTIVE DUTY	No	Detached/Departing Command within 30 days	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	CARR, MARINA	DEMO2	DEMO2	N63	N63	CONTRACTOR	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	EMELIANENKO, FEDOR	DEMO1	DEMO1	N4	N4	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	GUEVARA, ERNESTO	DEMO1	DEMO1	N1	N1	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	HUME, DAVID	DEMO2	DEMO2	N6	N64	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	JONES, DAVID	DEMO2	DEMO2	N6	N64	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	MERRIK, JOSEPH	DEMO1	DEMO1	N41	N41	CIVILIAN-APF	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	MOHAMMAD, ZAHIRUDDIN	DEMO1	DEMO1	N6	N6	CIVILIAN-APF	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	SOZE, KEYSER	DEMO1	DEMO1	N1	N12	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	SWIFT, ROB	DEMO1	DEMO1	N12	N12	ACTIVE DUTY	Yes	n/a	No	<a href="#">Send</a>
<a href="#">Delete</a>   <a href="#">Edit</a>	SYRACUSE, ARCHIMEDES	DEMO1	DEMO1	N13	N13	CONTRACTOR	Yes	n/a	No	<a href="#">Send</a>

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